



Transfer of Training

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Activities to Enhance Learning



TRAINING AND
DEVELOPMENT



Activities to Enhance Learning

Activity 1 – TEST YOUR KNOWLEDGE OF TRANSFER

Objective: To test students' understanding and retention of information presented about transfer.

Location of Lesson in Learning Module: Section 1.

Method: In-class exercise (written or verbal).

Estimated Time: 10 minutes.

Directions: Please complete the quiz to test your knowledge of transfer.

1. Which of the following best describes training transfer?

- a. Effectively learning the training content.
- b. Applying what was learned in training to the work setting.
- c. Telling peers about what was learned in training.
- d. Relocating a training session to another setting.

Answer: B

2. Which of the training topics could be designed with the theory of identical elements?

- a. Interpersonal communication
- b. Crisis management
- c. Software program
- d. Leadership

Answer: C

3. Stimulus generalization assumes that what type of transfer will occur?

- a. No transfer occurs
- b. Near
- c. Near/Far
- d. Far

Answer: D

4. Asking learners to consider possible applications of their learning to their job supports which theory of transfer?

- a. Cognitive
- b. Identical elements
- c. Stimulus generalization
- d. Action learning

Answer: A

5. Employers typically measure reaction and learning outcomes more than training transfer because:

- a. Transfer outcomes are not as important to improved performance as reaction and learning.
- b. High learner satisfaction and learning often result in successful training transfer.
- c. There may be a lack of knowledge about how to measure transfer outcomes.
- d. Measuring transfer outcomes can require additional time and resources.

Answer: D



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Activity 2 – CASE STUDY AND DISCUSSION

Objective: Using a case study, identify obstacles to transfer before, during and after training.

Location in Learning Module: Section 2.

Method: Independent reading and in-class discussion.

Estimated Time: 25 minutes

Directions: Read the case and discuss the following questions:

- A. How was transfer supported or not supported in this organization before, during and after training?
 - B. What was the ultimate effect of training?
 - C. What changes would you suggest to enhance transfer of training?
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Mini-Case

Organizational Profile

Southern Credit Union operates in more than 10 medium-sized cities in a southeastern state. As a credit union, Southern is owned by their members who save and borrow money through the institution. A portion of the union's profits is returned to members in various ways, including lower interest rates, lower fees and higher dividends on savings accounts.

Southern's front-line tellers provide routine banking services inside the credit union and at drive-through locations. Most front-line tellers are women, although the position has become more diversified recently. The New Accounts Department meets potential members to discuss the features of Southern's savings and checking accounts. The Mortgage Services Department provides mortgage options for home loans. The Investment Services Department has financial advisors who meet with members to discuss alternative investment strategies and options for growing their money. Credit union members are a diverse group in terms of racial demographics, age and gender.

Key Issues

The president of Southern Credit Union, Tom Jenkins, is relatively new; in fact, there have been three different presidents over the last six years. Not surprisingly, camaraderie has been lacking among managers, employees and the ever-changing leadership team. After meeting with the board of directors and in anticipation of an upcoming audit from the National Credit Union Administration, Jenkins decides that Southern needs to revisit its sexual harassment policy and procedures and determine when the last training session was held.

Jenkins meets with the HR director, Pamela Sanchez, and the training analyst, Heather Blackburn. They decide the sexual harassment policy is sufficient but realize that there has been no sexual harassment training in four years. Blackburn, who has been focusing on customer service training, is told by Jenkins to "make this happen by the end of next month."

Training Staff

Heather Blackburn has been a training analyst for only five months. She graduated with a B.A. in communications 15 years ago; after graduation she worked as a bank teller at a regional bank. She moved to Southern Credit Union as a bank teller because the pay was higher and the credit union had a good regional reputation. Blackburn was a bank teller at Southern for eight years, then applied for an internal transfer to the training job because she liked working with people and thought the job would be interesting. She joined the local American Society of Training and Development (ASTD) chapter last month to learn about the training profession in general and specific training methods. She reports to the HR director, Pamela Sanchez.



Design of the Sexual Harassment Training

Jenkins' request doesn't give Blackburn much time to develop and conduct the sexual harassment training. She decides to train first-line supervisors, since they are most closely involved in the front-line employee interactions. She doesn't have time to meet with anyone to get this training designed, so she sketches out a two-hour lecture. She wants to cover Southern's sexual harassment policy, the complaint procedure, and some recent court cases (gathered from the Employment Law Information Network) as examples of quid pro quo versus hostile work environment harassment. She creates handouts for trainees and schedules training off-site for 50 Southern supervisors to minimize distractions from their branch locations.

Three days before the training, Blackburn has all her lecture notes (in PowerPoint) prepared, handouts copied and the training room ready. She e-mails first-line supervisors about the mandatory training, tells them about the objectives of the training and gives them directions to the off-site training location.

The Training

As the supervisors enter the training room, they seem confused about the late notification of this training. As they talk among themselves, they wonder if one of the employees filed a sexual harassment complaint. Blackburn covers all the material she has prepared. She doesn't get a chance to ask for questions at the end of the session, but tells the supervisors to e-mail her with any questions they have about the material and reinforces her willingness to ensure they understood the information. Blackburn feels good about her organization and preparedness, and feels like the two-hour lecture was successful. The supervisors leave quickly to get back to their branch locations; some have several hours to drive and much to handle when they return to their jobs.

Report on the Training

Blackburn happily reports back to Jenkins and Sanchez with her perceptions of how the first-line supervisor training went. Blackburn reiterates how she met Jenkins' deadline, recounts the process she used to develop the training, and shows them the training materials and handouts. Blackburn plans to e-mail the supervisors in six weeks to remind them of key learning points and to see if they have any questions about the sexual harassment concepts, once they consider their own workplace situations. She will also ask them to rate their satisfaction with the training via a short e-mail survey.

Jenkins is satisfied because he can tell the audit team that the training took place. The HR director, though, is quiet during the meeting; she wonders whether this effort was well executed and is concerned about the ultimate effectiveness of the training.



Discussion to Accompany Mini-Case

Question: How was transfer supported or not supported in this organization before training?

Correct (or Best Possible) Answer:

There is room for improvement to support sexual harassment training before it occurs. Leadership turnover has affected worker camaraderie, morale and trust. The focus for this training is mainly on compliance (passing the upcoming audit) rather than building employees' interaction skills and the ability to address uncomfortable situations. Further, Blackburn lacks the formal training or prior experience needed to appropriately design and develop training and learning interventions, although her desire to get involved in ASTD is a step in the right direction.

While the motivation for the training is clear (compliance), the design does not lend itself to understanding or retaining the information. Granted, Blackburn wasn't given much time to design a training plan given Jenkins' mandate, but some things could have been done better. Announcement of the training could have been more strategic by using a top-down method to ensure that all employees understood the importance of this topic and how to address it in the workplace. Omitting managers, who need to walk the talk, and the front-line employees, who have to interact sensitively with many customers every day, from the training was probably not a good way to ensure a cohesive transfer climate for the training. By not involving anyone else in the design, the learning intervention will not receive the necessary buy-in. Finally, imposing mandatory training on such a short notice left trainees confused and anxious about the training; this will not enhance transfer.

Question: How was transfer supported or not supported in this organization during training?

Correct (or Best Possible) Answer:

Being organized and prepared is important for trainers but is not sufficient to ensure transfer. Trainees should have been engaged in the training by using mini-case scenarios based on real-life situations at Southern (with customers, among employees) to make the learning more meaningful. Videos and role plays may have been useful to demonstrate proper and improper responses to complaints of sexual harassment. Blackburn also fell into a common trap of allowing the clock to drive her learning content rather than the goal of the overall intervention (in other words, "This training needs to be 2 hours long" instead of "How long do I need to achieve the learning goals?"). While handouts can help learners with other-than-auditory learning styles, mnemonic devices may have helped supervisors remember steps to respond to sexual harassment complaints back at work. Not taking questions during training stifles learning and transfer, and does not address the trainees' emotional state (anxiety) at the beginning of the training. Lastly, PowerPoint can be a very "tell-oriented" instructional medium, so discussion and interaction time must be included to ensure students interact more directly with the material to increase their retention and transfer.

Question: How was transfer supported or not supported in this organization after training?

Correct (or Best Possible) Answer:

Not conducting a Level 1 measurement (i.e., survey of trainee satisfaction with the instruction) leaves Blackburn with little data about the program's effectiveness. Asking trainees as they rush out the door to e-mail their questions has good intentions but will likely not transpire. Asking for trainees' satisfaction six weeks after a program will cloud the data collected; trainees will not likely be honest because the data is being collected by e-mail and their identity will be known. However, reminding trainees of key concepts six weeks later could be a useful transfer strategy. It is likely that assessment of trainees' comprehension of the sexual harassment material will show lackluster results, as well as their ability to deal with relevant situations at work. Because Jenkins focused only on the compliance aspect, Blackburn probably has a false sense of accomplishment with this project; however, Sanchez will hopefully provide the mentoring and coaching Blackburn can use for her next training project.

It is likely that students will observe how the training's effect is minimized due to the lack of support before, during and after training. While transfer was supported in some ways, overall, it is likely too minimal to justify the time and effort



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expended by the trainees and trainer. Most important, no data was collected to demonstrate that the trainees understand the concepts of sexual harassment, know how to deal with everyday situations, or understand the company policy and grievance procedure. This may put the employer at risk; and the employer has missed an opportunity to bolster employees' interpersonal skills.



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Activity 3 – GENERATING IDEAS TO SUPPORT TRANSFER

Objectives:

- a. To analyze a hypothetical training scenario and create ideas for transfer interventions.
- b. To better understand the temporal dimensions (before, during and after training) and the primary stakeholders (trainers, trainees and supervisors) affecting transfer.

Location in Learning Module: Section 3.

Method: In-class application exercise.

Estimated Time: 20 minutes.

Directions: Read the following training scenario and generate at least two ideas to support transfer. Record your ideas in the 3 x 3 grid below. The grid includes the temporal dimensions (before, during and after training) and primary stakeholders (trainers, trainees and supervisors).

	BEFORE	DURING	AFTER
TRAINERS			
TRAINEES			
SUPERVISORS			

Scenario

You are a training manager at Copy Corner USA, a mid-size southern organization that provides office-related services to corporate and individual clients. Your organization plans to expand operations to the midwest, and there will be an influx of new front-line employees in the new operating region. The CEO wants to ensure that new employees are ready to hit the ground running and decides that a significant training initiative is needed. You are designing and delivering the training program in-house to ensure that organizational culture and values pervade the skills training for the new employees. The training will cover order-taking, machine operation, Copy Corner’s customer service skills and service recovery (to handle dissatisfied customers).

As the training manager, you want to make sure the new training initiative pays off. Specifically, you are interested in the effective, continuous application of the trained skills and knowledge on the job.

What specific recommendations do you have to make sure employees will use the training on the job? List at least two specific ideas in each box of the 3 x 3 grid to ensure that primary stakeholders transfer the training before, during and after it occurs.



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DISCUSSION TO ACCOMPANY SCENARIO

The 3 x 3 grid below lists ideas for transfer interventions students might generate in response to reading this scenario.

	BEFORE	DURING	AFTER
TRAINERS	<ul style="list-style-type: none"> • Design training using actual customer orders and scenarios. • Communicate training goals and expectations to trainees and supervisors. • Ensure managers are involved in training design. 	<ul style="list-style-type: none"> • Use the actual equipment and machines in training. • Create mnemonic devices to help trainees remember key concepts. • Stick to “must-know” content. • Keep trainees involved. 	<ul style="list-style-type: none"> • Send follow-up e-mails to trainees one month after training to reiterate key concepts. • Distribute posters or job aids in the workplace to remind employees of training concepts. • Conduct Level 3 evaluation.
TRAINEES	<ul style="list-style-type: none"> • Sit down with supervisors and discuss the training and why it’s important to the organization. • Finish assigned reading before training. • Come to training with an open attitude for learning. 	<ul style="list-style-type: none"> • Stay engaged during training. • Ask questions. • Create an action plan. 	<ul style="list-style-type: none"> • Keep job aids visible. • Talk with supervisor about the training. • Talk with other trainees about how they are applying the training at work.
SUPERVISORS	<ul style="list-style-type: none"> • Sit down with the employees to discuss learning goals. • Support the training program and model concepts at work. • Explain how transfer is incorporated into the organization’s performance appraisal system. 	<ul style="list-style-type: none"> • Do not disrupt trainees during the program. • Introduce the training or have lunch with your trainees. • Reinforce your organization’s commitment to customer service. 	<ul style="list-style-type: none"> • Ask trainees what they learned and for examples. • Coach employees through difficult customer service experiences based on the training content. • Discuss transfer behaviors in trainees’ performance reviews.



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Optional Activity – TRANSFER RESEARCH QUIZ

Objectives:

- a. To discuss provocative research findings on transfer and their implications for trainers and managers.
- b. To inform teaching with contemporary transfer research.

Location & Method: At the end of Transfer Learning Module or as an independent assignment.

Estimated Time: 15 minutes.

Directions: Please answer “True” or “False” to each statement below.

1. Transfer success is influenced more by whether trainees like a training program than by their perception of the usefulness of the training.

Answer: False

Research Support: Most studies note a minimal relationship between trainee reaction/satisfaction and transfer ($r_c = .11$ in Colquitt et al., 2000). In a meta-analysis of training criteria, Alliger et al. (1997) found learner utility reactions were associated with learning transfer more than trainees’ affective reactions.

Implications for Trainers and Managers: It is important that trainers and supervisors clearly discuss with trainees how they can use the specific training at work.

2. On average, trainees high in negative affectivity (i.e., the tendency to feel negative emotions) achieve lower levels of transfer success.

Answer: True

Research Support: Anxiety produces a negative correlation with every training outcome, including transfer (Colquitt et al., 2000). Machin & Fogarty (2004) found that negative affectivity is the only significant predictor of post-training transfer implementation intentions.

Implications for Trainers and Managers: Trainers and supervisors may need to model positive attitudes and express the value and use of training, particularly to trainees high in negative affectivity.

3. The more content presented to trainees, the more they will retain.

Answer: False

Research Support: Cognitive-load theory suggests that learners can learn only so much at one time (Chandler & Sweller, 1991). Also, negative transfer can occur when extraneous (i.e., information not required to perform) is included (van Merriënboer, 1997).

Implications for Trainers and Managers: Trainers should focus on “must-know” information rather than “nice-to-know” information during training sessions, and focus on information relevant and useful for workplace application.



4. Holding trainees accountable for using training on the job has little influence on transfer success.

Answer: False

Research Support: A meta-analysis by Taylor et al. (2005) found that trainees are more likely to transfer learning to the job when sanctions and rewards are used. A survey by Longnecker (2004) of 278 managers indicated that a primary learning imperative to increase learning transfer is to enhance accountability for application, such as requiring a trainee's report post-training. Saks and Belcourt (2006) found accountability (as measured by requiring trainees to share their new learning via a report or interview as a follow-up to training) was positively related to transfer ($r = .30, p < .0001$).

Implications for Trainers and Managers: Various mechanisms and activities can be used by trainers and managers to impress upon trainees that transfer is expected. Ideas include learning contracts; action plans; follow-up learning or transfer reports; and inclusion of transfer in performance appraisal systems.

5. The most important factor of how much training employees actually use on their jobs is how much they learned during training.

Answer: False

Research Support: Evidence shows that post-training knowledge has a smaller relationship with transfer than even some individual differences and contextual variables (Colquitt et al., 2000). For example, the correlation between organizational climate and transfer was .37 in Colquitt and colleagues' study.

Implications for Trainers and Managers: Supervisors play a critical role in supporting transfer before, during and after training interventions.



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